

The Virtual PM

Robert L. Weinhold



The era of the Virtual PM (project manager) is alive and well! In an age of cellphones, Blackberries, e-mail, conference calls, flextime and flex place, the PM no longer has the luxury of always being able to schedule face-to-face, weekly meetings with his or her team. The current work environment requires the PM to be even more adaptable, flexible and available virtually. Decisions no longer can be made on paper or staffed through layers of management; instead they have to be made out of sight and in real time from wherever the PM is located, and whenever the situation calls for it.

For some of us older PMs, it has been quite an adjustment, but in many ways a very welcome one, depending on the circumstances. I find myself in the role of senior acquisition specialist supporting an Army PM who is very mobile and constantly on the move. Fortunately, I am not required (nor do I chose) to be a “road warrior,” so I can support the project team from home base while the PM takes care of business outside the office environs as the project and schedule require.

The keys to success in this new virtual environment, I believe, are centered on the following five traditional management principles.

Weinhold is a senior acquisition specialist and consultant with Jacobs Technology supporting the Product Manager, Soldier Protective Equipment, PEO Soldier, at Fort Belvoir, Va., which is responsible for acquiring hard and soft personal body armor for the Army. He is a retired U.S. Air Force lieutenant colonel.

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1 Communication. In the Virtual PM environment, communication may be the principal key to the success or failure of a program. The communication network has to be well wired and constantly engaged among all of the team members. Project status has to be continuously communicated, updated, understood and accurately reported across the team as well as to management, stakeholders and decision makers. Any weaknesses in the communication network have to be corrected immediately and the flow of project information has to be properly directed with task actions assigned, understood and deadlines established that are realistic and completed on time. Team members must have the appropriate tools to communicate and must be constantly in the loop regarding changes in program direction, organizational policy, and project priorities.

Too many organizations are still “communication challenged” as they practice one-on-one conversations among team members rather than exercising the team

to share information among all team members. This is a most inefficient and ineffective way to manage any program and can create confusion among team members, as one-on-one conversations more often than not result in different interpretations of the same information, duplication of effort and the need to conduct even more dialogue to clarify the misunderstandings created by multiple two-person discussions on the same subject. It is a hazard for all types of information flow whether from the top down, the bottom up, or across the organization. While such one-on-one communications are certainly necessary for the execution of specific tasks, nothing can replace a team meeting of all members to present a corporate vision, clarify organizational goals and gain a common understanding of the priorities of the organization and the team. Of course, there also is the mundane topic of reviewing action items, discussing travel plans, and touching on the current “hot topics.” These are some of the necessary, routine activities that a PM just has to do in his/her role as a leader and representative of the senior management of the organization.

One cautionary note in the Virtual PM environment is necessary regarding the use of electronic mail messaging: While the benefits of e-mail are many, the downside can be the downfall of the PM. How many times have you, the PM, so fallen behind on your e-mail messages that you find yourself spending half a morning or longer just working through a backlog? This, of course, is not an efficient use of a PM's time, although often it is understandably unavoidable. It may be necessary for the PM to establish some basic rules about the use of e-mail, such as limiting the amount of e-mails or

edly. This experience can vary widely depending on the personality and biases of the individual. While some people are pretty "thin skinned" and may resent any kind of reminder, others are more than happy to be approached for status or general information and welcome the interaction. The real challenge comes with the former people who, unfortunately, may have to be handled with kid gloves. This situation could present an even greater challenge for the Virtual PM if he or she has to intervene from afar. This is where the PM will be ahead of the game if his team members have been instructed

The bottom line is that there is absolutely too much work for one or two members of the team to accomplish efficiently. It takes the entire team working under the delegation of the PM and/or deputy PM toward the completion of the corporate mission.

restricting them to only urgent messages during specific hours of the workday. Another caution regarding e-mail traffic is that unexpected blocking of outgoing emails because you exceeded the maximum capacity for record storage on your server. While it may be a simple matter of e-mail discipline, it can present an untimely interruption when the PM or a team member is trying to catch up on some necessary e-mail message responses or maintenance.

2 Follow-up. Although follow-up falls under communication, it deserves separate consideration due to the critical need for follow-up on the many actions generated by the Virtual PM and other virtual team members. Following up generally implies there is a system or database that contains the details of the follow-up actions. Someone on the team, therefore, must be assigned to track the many actions communicated from the PM to the team members, and among the team members, so that the right people make timely and complete responses with the right information to the right audience. Follow-up may entail two to four or more times to revisit a particular action—and while it may seem like overkill, in my experience there's no such thing as "too many times" to follow up. If an action is important enough to assign, it is important enough to follow up as many times as possible until it is completed. It only takes one action left unattended that could result in dire consequences to the program, so the adage "better safe than sorry" is more than a cliché in this case.

A delicate balance is necessary between constant follow-up and the "blowback" that can occur when people feel they are being badgered rather than just asked for something repeat-

and/or trained adequately in dealing with the proverbial difficult employee. The PM should consider investing some time in this area. It could result in big dividends down the road when his team members have to handle such situations on their own. It will take some of the stress out of the PM's job and save everyone on the team some unnecessary work and possibly grief.

3 Delegation. No man (or woman) is an island. Truer words were never spoken in the virtual environment. I learned a long time ago, long before the concept of a virtual environment, that no PM, supervisor, manager or leader can succeed without delegating to some degree. It can be a difficult concept, especially for those control types who just can't give up the simplest of tasks for any number of reasons, from lack of trust in subordinates to an inherent feeling that only the PM can do a task the way it needs to be done. To operate successfully in today's chaotic and fast-paced environment, the virtual manager must learn the art of delegation. Certainly, delegation does not mean abdication. Rather, it means assigning a task, communicating an understanding of that task and periodically checking on the progress of that task until it is complete. It requires, again, communication but demands a level of trust in other members of the team. The bottom line is that there is absolutely too much work for one or two members of the team to accomplish efficiently. It takes the entire team working under the delegation of the PM and/or deputy PM toward the completion of the corporate mission. This means everyone on the team has a stake in his or her individual success as well as the success of the PM and the overall success of the organization.

Delegation has become something of a lost art, yet it can save the Virtual PM a great deal of time and contribute immensely to the efficiency and effectiveness of the team. The Virtual PM actually can delegate from afar, which means he doesn't have to be a homesteader to engage in this vital activity. "Letting go" is possibly one of the most difficult management concepts in the PM's toolbox, but also possibly one of the most important. It can mean the difference between work getting done on time and work not getting done at all. It also can save precious work hours and increase the productivity of the organization by orders of magnitude. Finally, it can improve the team members' abilities to manage themselves through increased responsibilities and the development of an increased level of trust demonstrated by the PM for his subordinates. Mistakes will be made along the way, but the Virtual PM must be willing to accept these mistakes and understand that the gains realized through delegation will, generally, far outweigh any damages from the mistakes of the team members.

4 Visibility. Another subset of communication is visibility of the team members and of the team's progress and success. The question and the challenge is how to make things "visible" in this virtual environment. The old-fashioned way of achieving visibility (face to face) is not always feasible. Aligning all the team members' schedules to the PM's schedule is rarely possible, particularly when there is a geographic separation of some of the members, the virtual environment notwithstanding. The best way to ensure some face time is to plan periodic (quarterly or monthly, if possible) team meetings at a designated location either at or away from

situation, but one possibility was to bring these two principal team members together for face-to-face interchanges with the team members. These were awkward at first, but after the PM and CO realized the benefits of such meetings, they embraced them and actually started to have meetings twice a week. The build-up to the release of a major solicitation was, in large part, driving the frequency of these meetings; nevertheless, they accomplished what was needed by providing face time to address ongoing issues on a real-time basis. This was somewhat of an epiphany for everyone and, as I look back on the experience, I am convinced of the absolute necessity of injecting visibility into team activities, notwithstanding the very difficult schedule challenges. At the end of the day, a picture really is worth a thousand words and a 1-hour face-to-face meeting is worth a thousand visual images. Accordingly, the Virtual PM must somehow make time available periodically to be visible to his staff and make his staff members visible to each other.

5 Roles and Responsibilities. One of the most basic, yet least practiced, concepts has become the need for defining, stating and clarifying roles and responsibilities. The idea that any organization can bring employees into a work setting and not clearly articulate their roles and responsibilities violates basic management principles at many levels. My experience in government and management consulting has demonstrated that those organizations that do a good job in this area reap the benefits of all the previous concepts of communication, visibility, delegation and follow-up simply because people understand their assigned tasks. Such enlightenment leads employees to a comfort level at

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the daily worksite. My experience as a PM has been to conduct weekly meetings limited to 1 hour, with a specific agenda and designated roles and responsibilities during that 1-hour session. Many PMs, of course, would consider this a luxury.

At the start of one of my prior work assignments in support of a government PM, I discovered that the PM did not conduct team meetings with the entire team, including the contracting officer (CO). Most exchanges between the PM and CO were conducted over the phone and it created some angst between the two that had been festering over a long time. Two strong personalities were involved, which is always a difficult


which they know exactly where they fit into the organization and what management's expectations are, merely because roles and responsibilities were stated clearly from the outset.

This is not "rocket science," although a rocket scientist may say to a prospective employee that his role is not "defense acquisition." I guess it's all relative, depending on where you sit (or stand). Many organizations seem to take this area for granted and assume that because a person was hired for a particular job that person both knows and understands his or her roles and responsibilities. In fact, this meeting of the minds may never have occurred—and situations do change

over time. I have had several experiences on this subject that led to a less than clear understanding of what my roles and responsibilities as a PM were supposed to be.

During one assignment, I was hired for a specific position on a pending contract award. As it turned out, the company didn't get the contract so it had to make some key decisions regarding what to do with me and several others hired for that particular contract. Unfortunately, the position description never was defined fully for the original position that did not materialize, so it turned out to be a moot point. However, the subsequent assignments also were not described and I became somewhat of a jack-of-all-trades, filling in where I was needed. It was a tenuous situation, at best, and created some uncertainty for me as a new employee as well as for my immediate superior. Eventually, I settled into a position as a contracts specialist, not as the PM I had hoped to be, but it did provide long-term and important work with the federal government. Nonetheless, the roles and responsibilities never were documented or made final, so there always was a sense of not knowing where I truly fit into the organization.

The lesson learned is that roles and responsibilities should not be taken lightly or left to chance. It is absolutely critical that each employee knows and understands from the beginning what his or her specific role in the organization is, and that his or her responsibilities are defined in sufficient detail that both the employer and the employee clearly understand the expectations of the position and the person. The lack of such a clear understanding does a disservice to both the organization and the individual and further complicates the job of the Virtual PM, who has enough to manage.

In conclusion, Virtual PMs face challenges unlike any they have had to face in the recent past. The dynamics of the economy, the workplace and world events demand that the Virtual PM concentrate on some of the basic, time-tested and successful management principles. While the five foregoing concepts may portray a stark grasp of the obvious, they have certainly demonstrated to me over more than 35 years of experience in DoD acquisition and program management that the payback can exceed anyone's expectations. While we desperately need the technology and electronic communication tools to survive and continually maintain the advantage in our management challenges, we should never lose sight of the basic management principles that have brought us to where we are today. Without the likes of Frederick Taylor, W. Edwards Deming, Peter Drucker, Milton Friedman and so many other pioneering visionaries in the management field, we might not have advanced to the degree of management sophistication that we have. Spending some time on the basics not only will keep us grounded in what is really important, it also will provide the edge we all need to survive in the ever-changing technological age and through the continuing evolution of the Virtual PM. 

The author may be contacted at robleew@outlook.com.

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